



# NBRSS Today

Supporting Scientific Research through Business Solutions

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## *From our Project Manager...*

***If you keep on doing what you've always done, you'll keep on getting what you've always got. --W. L. Bateman***

The NBRSS Today has been established to keep the NIH community informed about the ongoing activities of the NIH Business and Research Support System (NBRSS) project, including the NIH Business System (NBS) and the Enterprise Human Resources and Planning (EHRP) System.

The NBS Functional Teams and their NIH advisory groups have completed the development, review, and nearly all approvals of the future business processes. Each team is working closely with the Systems Integrator, configuring, adapting, and testing the Oracle software to support the new work processes.

Meanwhile, the Enterprise Human Resources and Planning (EHRP) system team is preparing the community for a targeted implementation this summer. Thus far, they have provided EHRP system demonstrations to approximately 280 administrative and supervisory/managerial staff members, including those at NCI in Frederick, Maryland and NIEHS in North Carolina.

## ***News & Highlights...***

***Staffing Update:*** The NBRSS is pleased to announce the addition of Darla Allen and Theresa Chester, both formerly Human Resource Specialist Team Leaders within the National Cancer Institute's Human Resources Management and Consulting Branch. Darla and Theresa will be joining the NBRSS Change Management Team. Darla will handle EHRP change management activities, including communications, training, and workforce transition issues, and Theresa will provide leadership to the workforce transition issues related to the deployment of the NBS.

***NBS Project Status:*** The NBS Functional Advisory Committees have completed their review and nearly all approvals of the new business processes, as the Functional Teams continue pressing forward with system configuration. As you may recall from previous editions of *The NBRSS Today*, configuration is the process of adapting the Oracle software to support the newly designed processes and determining which process variations best suit NIH business needs. All configuration decisions will ultimately be verified over the course of two pilot testing sessions, known as Conference Room Pilots 1 & 2 (CRP1 & CRP2). These are controlled environments in which the Functional Teams and Systems Integrator configure and test the work processes,

making adjustments, as necessary. Currently, all of the Functional Teams are busy developing test scenarios and scripts to ensure that the Oracle application performs as planned.

### ***An inside look at the NBS Functional Teams...***

**Finance** - Wayne Berry, Della Wilson, and Mary Cushing have been meeting with DHHS financial staff to develop a model Chart of Accounts, which will determine how accounting and budget information will be collected and used for reporting purposes. The NBRSS will capture NIH specific requirements, as well as information that can be used by the Department's Uniform Financial Management System for meeting consolidated reporting requirements. The data will be collected in a format that supports the needs of both NIH and DHHS.

The Finance Functional Advisory Committee has reviewed and approved most of the new work process summaries for General Ledger, Accounts Receivable, and Accounts Payable. The Committee has also identified a number of issues to be tested as the Oracle software is being configured, and they have provided valuable input regarding future workload considerations and training needs for the NIH user community.

Meanwhile, the Finance Team has been meeting with other NBRSS Functional Team members to resolve issues affecting the overall project, such as organizational codes, object class codes, and commitment accounting.

Wayne, Mary, and Della have gone through a series of steps that enabled them to decide how the system will be tested. The group has been writing test scenarios and specific test scripts to guide their efforts with the NIH configuration during the pilot sessions.

The General Ledger portion of the Oracle Financial module is scheduled to "go live" in October of this year. Some Office of Financial Management staff will begin training for this part of the system in August.

**Property** – The Property Functional Team, consisting of Candy Mason and Ron Boardley, continues working with their respective Functional Advisory Committee and Resource Team, as well as various property and finance management counterparts throughout NIH, ensuring that documented NBRSS NIH Property Management processes meet DHHS and NIH requirements.

Datastream, the software application selected to track personal property, differs from the Oracle applications used in the other functional areas because it comes with standard functionality. The Datastream software, on the other hand, must be configured to meet NIH property management functional requirements. Several Datastream consultants recently joined the Property Functional Team, and together, they conducted a thorough analysis of the Datastream functionality. Subsequent to their review, an organizational/security hierarchy and several new screens and forms have been developed as part of the software configuration. A demonstration of this initial Datastream configuration was provided on March 7, during a combined presentation to the Property Team's Functional Advisory Committee and Resource Team.

The Property Team has also begun developing scenarios for testing the new application after initial configuration of the Datastream application is completed. This testing will occur during the first pilot testing session. Ron and Candy, along with a host of others in the NIH community, continue to diligently review alternatives for meeting NIH disposal and inventory requirements, which are crucial components of any property management system.

**Travel** – Kathy Chiacchierini, the NBS Travel Lead, is concluding the configuration and script writing process with approximately 80 scripts that will be used to test the full functionality of Gelco Travel Manager during the first pilot session. For example, there are scripts to test government per diem rates, conference rates, and actual expense allowances, as well as scripts to test travel-related expenses, annual leave situations, advances and allocation of funds among multiple accounts - both direct and reimbursable. Test results from the first pilot session will indicate the capability of Travel Manager software to accept a wide-range of trip data, process the data correctly, and produce the expected result. This first pilot offers the team a chance to identify and correct “bugs” in the Gelco System in preparation for the second pilot session.

A series of interfaces have been developed to link travel data in Travel Manager to the corresponding financial process in Oracle financials. Full integration between the Gelco and Oracle applications will be confirmed in the second pilot testing session. During that time, the Travel Team will develop complete end-to-end trip scenarios and test the financial transactions that are passed/processed between Travel Manager and the Oracle system

**Acquisition** – Dorann Penney, Jim Marx, and Dennis Black, the Acquisition Functional Team, are in the final stages of test scenario development for the acquisition processes, where they are preparing both test scripts and summaries. Recently, a demonstration was presented to the Acquisition advisory groups, showcasing the input and approval of a non-catalog requisition via i-Procurement, creation of a purchase order in the Oracle application, and receipt of the product through i-Procurement. Subsequently, the advisory panels provided valuable insight for configuring the test applications. You can look forward to future demonstrations being provided to various acquisition components in the NIH community.

**Supply** – JD Thomas and Dave Rhoads have been collaborating with CIT and other NIH program officials, mapping supply data in NIH legacy systems to the new Oracle applications. During the course of this exercise, they discovered that not only are many fields in the Administrative Database no longer needed, but also, some essential supply fields are not currently available in the standard Oracle product. The Supply Team and their advisors are currently analyzing and resolving discrepancies between the two systems.

The Oracle Warehouse Management System will be implemented at the Gaithersburg Distribution Center and possibly in the Self Service Stores and other NIH supply facilities. In preparation for the new application, essential NIH supply personnel recently attended two comprehensive Oracle training classes: Order Management and Warehouse Management. This same group will receive additional training, as the January 2004 deployment date for this module nears. Presently, Dave and JD are writing supply test scripts for verifying the Oracle product before it goes “live.”

**Service & Supply Fund (SSF)** – Diane Charuhas and Nancy Parfitt Hondros continue configuring the Oracle Projects software to meet the needs of the NIH SSF businesses. They are developing test scenarios and writing detailed scripts in preparation for functionality testing in the upcoming pilot sessions. The two central service activities to be piloted are the Division of Engineering Services and the Medical Arts and Photography Branch. As the testing process

begins, the Functional Advisory Committee and Resource Team members will play an active role in testing the software and assessing its ability to support the NIH mission.

A key step in the Projects software implementation is defining what a Project will actually represent at the NIH, and the SSF team is currently working through this exercise. As mentioned in the February 2002 edition of *The NBRSS Today*, Nancy, Diane, and the Finance Functional Team are collaborating to expand the applicability of Projects to the entire NIH community. Projects can potentially serve as a management analysis tool for reviewing a broader activity or program from the financial perspective in greater depth and dimension than in the General Ledger. The SSF Team is also working with the other Functional Teams, discussing how the NIH-wide integration of Projects may impact test script development.

***Research & Development (R&D) Contracts*** – The R&D Contracts Functional Advisory Committee has approved all of the process design summaries for R&D Contracts, marking the successful completion of this important phase. David Snight and Mary Armstead are preparing the specifics for testing and are currently immersed in configuration, test scenario, and test scripting efforts. The R&D Contracts team is also engaged in change management activities as the NBRSS Change Management Team plans communications and training activities for those to be impacted by the new way of doing R&D contracting. The NIH community involved in R&D contracting should anticipate several opportunities to learn more about the functional team's progress in the coming weeks and months as a variety of communications are being planned.

### ***What's Next???***

As the Functional Teams navigate their way through the first pilot session, each individual work process will be tested to ensure the anticipated functionality of each unit. As discrepancies are noted, modifications will be made and the process will be retested until the desired results are achieved.

In the second pilot session, the software will be tested this time to ensure integration of all NBRSS business functions. At this juncture, Resource Team members may be asked to participate and provide input. Interfaces between the various functions and between the ADB and NBRSS will also be tested to verify their effectiveness, and system administration will be tested to evaluate cross-functional integration of workflow, including human resources. Finally, data conversion and interfaces between the NBRSS and ADB will be fully tested using live data, whenever feasible. Check the [NBS deployment schedule](#) to see what else is coming.

### ***EHRP Project Status...***

In a continuing effort to educate and prepare the NIH community, members of the Enterprise Human Resources and Payroll (EHRP) system team, along with staff from KPMG Consulting, presented a system demonstration to NIAAA's administrative community. This initial group served as a pilot to prepare for demonstrations to the rest of the administrative community. Their invaluable feedback was incorporated, and we have completed the EHRP demonstrations to approximately 280 individuals comprised of administrative and supervisory/managerial staff, including staff at NCI in Frederick, Maryland and NIEHS in North Carolina.

During the latter part of January, the Department of Health and Human Services' Program Support Center (PSC) conducted a pilot training session for the EHRP administrative staff. One member from the NIH was represented at the training. The feedback from the participants will be used by the PSC to refine their course materials that will be used for the training.

We are very pleased to say that the EHRP/PeopleSoft Hands-On Workshops for the NIH human resources (HR) community have been well attended! These workshops provided an opportunity to get a feel for the new system through processing sample personnel actions. Originally there were four workshops scheduled. Due to the heavy demand for the workshops and the desire to accommodate the HR community, the EHRP team added several more sessions. To date, we have conducted 12 out of the 13 workshops planned, including NIEHS in North Carolina. It is estimated that approximately 203 HR personnel have taken advantage of this opportunity. The workshops were not intended to replace training. Official training will be provided by the PSC at the appropriate time before we "go live" with the new system in the summer - check the [EHRP deployment schedule](#) for more details.

Want to know more? We would like to invite you to visit our EHRP website at:  
<http://nbs.nih.gov/ehrp>.

***If you want truly to understand something, try to change it. --Kurt Lewin***

In the February 2002 edition of *The NBRSS Today*, we informed you that implementation of the NBS will introduce various changes to the NIH community. The identification and evaluation of the organizational impacts of these changes are critical aspects of the overall project implementation and change management plans, as this information serves as the basis for future training and workforce transition initiatives.

Each Functional Team, in conjunction with their change management representative, has identified and evaluated potential impacts in their respective functional area. The Change Management Team is currently completing a draft of their initial assessment of these impacts. As the teams progress through the pilot testing sessions, additional changes may become apparent, and the impacts of previously identified changes will be reevaluated. As these impacts become clearer, they will be communicated to the NIH community to prepare users for arrival of the new system. The teams look forward to sharing with you their first impressions of the changes that will transpire, so keep reading future editions of *The NBRSS Today* for more information on this very important topic.

***Communications...***

NBRSS team members continue with their efforts to increase NBRSS project awareness in the NIH community. The Functional and Change Management Teams have joined forces to deliver presentations and system demonstrations to various groups in the NIH community. Click here to see where the teams have been going with their message. Please contact Gail Kalde if you would like an NBRSS team member to address your group <mailto:kaldesg@mail.nih.gov>. Also, look forward to some other communications initiatives, including town hall meetings, fact sheets, and white papers.

The NBRSS website has a new look. The general color scheme and design are the same, but the name on the opening page has been changed to *NBRSS Matters*. The content has been arranged

into the categories of *Project Management*, *Committees/Teams*, and *Documents* to make site navigation a little easier. So, if you want to know the name of the NBRSS Project Manager or when the Travel module will go live, look under the heading of *Project Management*, and select Project Management Team or Project Timeline, respectively. If you want to know who's on the Steering Committee or the SSF functional team, look for the appropriate link under *Committees/Teams*. The EHRP project also has a large section of the NBRSS website devoted to their activities. Let us know what you think about these changes by e-mailing us in the *Questions about the NBRSS* section or at <mailto:gregorym@mail.nih.gov>. And remember; check the *What's New?* link to keep up with new advancements in the NBRSS project.

### ***Training...***

Sally Murray, the NBRSS Training Specialist, and KPMG Consulting have been diligently working on an ambitious implementation schedule that will train 1300 employees in the use of PeopleSoft – the software application for the EHRP system.

The EHRP curriculum includes three hands-on courses:

- EHRP Management (1/2 day) for managers, administrative officers/ assistants, and support staff who request, authorize, and approve personnel actions via electronic means.
- EHRP Human Resources Training (4 days) for employees who are responsible for processing personnel/payroll actions and employee benefits on a frequent basis.
- EHRP Human Resources Training (2 days) for those who provide advisory and consultative human resources services.

Each employee will receive a procedure manual, which will serve as a reference guide for using the EHRP system and be able to enroll in a PeopleSoft on-line navigation tutorial prior to taking a course.

The NBS training plans and curricula are still under development for each functional area. General Ledger/Budget is the first module scheduled for deployment, and its training plan will be finalized soon.

### ***Workforce Planning...***

The implementation of the NIH Business System (NBS) represents a significant shift in how work is accomplished in each of the NIH's Institutes and Centers (ICs) and across functional areas. It involves not only new technology but new business processes, as well. The NBRSS Change Management Team has been coordinating with the Office of Human Resource Management, as well as its Workforce Performance and Measurement Division, to address these workforce transition issues. The Change Management Team will develop options for NIH management to consider for transitioning the workforce impacted by deployment of each functional module of the NBS. The first plan to be developed will address the deployment of the GL/Budgeting module.

### ***Questions/Feedback...***

We would like to thank readers for taking the time to provide us with feedback about the newsletter's format. As a result, we have adopted a new template to facilitate navigation. Please keep your comments coming because this information is for you!

We encourage you to share this publication with your colleagues, staffs, or anyone else who may be impacted or interested in this project. For information, comments, or questions about the NBRSS project or newsletter, contact Marina Gregory at <mailto:gregorym@mail.nih.gov>. The next distribution of *NBRSS Today* is scheduled for June.